



**DEBRA BOWEN** | SECRETARY OF STATE  
STATE OF CALIFORNIA | ELECTIONS

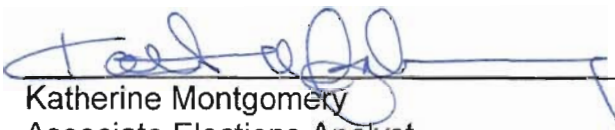
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January 8, 2009

County Clerk/Registrar of Voters (CC/ROV) Memorandum #09001

TO: All County Clerks/Registrars of Voters and Proponent

FROM:

  
Katherine Montgomery  
Associate Elections Analyst

RE: Initiative: 1349, Related to Education

Pursuant to Elections Code section 336, we transmit herewith a copy of the Title and Summary prepared by the Attorney General on a proposed initiative measure entitled:

**UNIVERSITY OF CALIFORNIA RETIREMENT BENEFITS BOARD.  
INITIATIVE CONSTITUTIONAL AMENDMENT.**

The proponent of the above-named measure is:

Lakesha Harrison  
c/o William Schlitz  
2201 Broadway, Suite 315  
Oakland, CA 94612  
(510) 844-1160

UNIVERSITY OF CALIFORNIA RETIREMENT BENEFITS BOARD.  
INITIATIVE CONSTITUTIONAL AMENDMENT.

CIRCULATING AND FILING SCHEDULE

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1. Minimum number of signatures required: .....694,354  
California Constitution, Article II, Section 8(b)
2. Official Summary Date: .....Thursday, 01/08/09
3. Petitions Sections:
  - a. First day Proponent can circulate Sections for  
signatures (Elec. Code § 336) ..... Thursday, 01/08/09
  - b. Last day Proponent can circulate and file with the county.  
All sections are to be filed at the same time within each  
county. (Elec. Codes §§ 336, 9030(a))..... Monday, 06/08/09\*
  - c. Last day for county to determine total number of  
signatures affixed to petitions and to transmit total  
to the Secretary of State (Elec. Code § 9030(b)).....Thursday, 06/18/09  
  
(If the Proponent files the petition with the county on a date prior to  
06/08/09, the county has eight working days from the filing of the petition  
to determine the total number of signatures affixed to the petition and to  
transmit the total to the Secretary of State) (Elec. Code § 9030(b)).
  - d. Secretary of State determines whether the total number  
of signatures filed with all county clerks/registrars of  
voters meets the minimum number of required signatures  
and notifies the counties.... Saturday, 06/27/09\*\*
  - e. Last day for county to determine total number of qualified  
voters who signed the petition, and to transmit certificate  
with a blank copy of the petition to the Secretary of State  
(Elec. Code § 9030(d)(e)) ..... Friday, 08/07/09

\* Date adjusted for official deadline, which falls on a weekend (Elec. Code § 15).

\*\* Date varies based on the date of county receipt.

**INITIATIVE #1349**

**Circulating and Filing Schedule continued:**

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(If the Secretary of State notifies the county to determine the number of qualified voters who signed the petition on a date other than 06/27/09, the last day is no later than the thirtieth working day after the county's receipt of notification). (Elec. Code § 9030(d)(e)).

- f. If the signature count is more than 763,790 or less than 659,637 then the Secretary of State certifies the petition as qualified or failed, and notifies the counties. If the signature count is between 659,637 and 763,790 inclusive, then the Secretary of State notifies the counties using the random sampling technique to determine the validity of **all** signatures (Elec. Code §§ 9030(f)(g), 9031(a)) ..... Monday, 08/17/09\*
- g. Last day for county to determine actual number of all qualified voters who signed the petition, and to transmit certificate with a blank copy of the petition to the Secretary of State. (Elec. Code § 9031(b)(c)). ..... Wednesday, 09/30/09

(If the Secretary of State notifies the county to determine the number of qualified voters who have signed the petition on a date other than 08/17/09, the last day is no later than the thirtieth working day after the county's receipt of notification.) (Elec. Code § 9031(b)(c).)

- h. Secretary of State certifies whether the petition has been signed by the number of qualified voters required to declare the petition sufficient (Elec. Code §§ 9031(d), 9033) ..... Sunday, 10/04/09\*

\*Date varies based on the date of county receipt.

## IMPORTANT POINTS

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- California law prohibits the use of signatures, names and addresses gathered on initiative petitions for any purpose other than to qualify the initiative measure for the ballot. This means that the petitions cannot be used to create or add to mailing lists or similar lists for any purpose, including fundraising or requests for support. Any such misuses constitutes a crime under California law. Elections Code section 18650; *Bilofsky v. Deukmejian* (1981) 124 Cal.App.3d 825, 177 Cal.Rptr. 621; 63 Ops.Cal.Atty.Gen. 37 (1980).
- Please refer to Elections Code sections 100, 101, 104, 9001, 9008, 9009, 9021, and 9022 for appropriate format and type consideration in printing, typing and otherwise preparing your initiative petition for circulation and signatures. Please send a copy of the petition after you have it printed. This copy is not for our review or approval, but to supplement our file.
- Your attention is directed to the campaign disclosure requirements of the **Political Reform Act of 1974**, Government Code section 81000 et seq.
- When writing or calling state or county elections officials, provide the official title of the initiative which was prepared by the Attorney General. Use of this title will assist elections officials in referencing the proper file.
- When a petition is presented to the county elections official for filing by someone other than the proponent, the required authorization shall include the name or names of the persons filing the petition.
- When filing the petition with the county elections official, please provide a blank petition for elections official use.

EDMUND G. BROWN JR.  
Attorney General

State of California  
DEPARTMENT OF JUSTICE



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January 8, 2009

**FILED**  
In the office of the Secretary of State  
of the State of California

JAN 08 2009

Debra Bowen, Secretary of State  
1500 11<sup>th</sup> Street, 5<sup>th</sup> Floor  
Sacramento, CA 95814

Debra Bowen, Secretary of State  
By   
Deputy Secretary of State

Attention: Ms. Katherine Montgomery  
Associate Elections Analyst

Re: **Initiative 08-0019 "The UC Retirement Board of Trustees."**  
Official Circulating Title: **University of California Retirement Benefits Board. Initiative  
Constitutional Amendment.**

Dear Secretary Bowen:

Pursuant to Elections Code, sections 9004 and 336, you are hereby notified that on this day we mailed our title and summary for Initiative 08-0019, "The UC Retirement Board of Trustees" to the respective proponent.

Enclosed is a copy of that title and summary, and a copy of the proposed measure.

Sincerely,

  
KRYSTAL M. PARIS  
Initiative Coordinator

For EDMUND G. BROWN JR.  
Attorney General

kmp:  
Enclosures

Proponent:  
Lakesha Harrison  
c/o William Schlitz  
2201 Broadway, Suite 315  
Oakland, CA 94612

Date: January 8, 2009  
Initiative No.: 08-0019

The Attorney General of California has prepared the following title and summary of the chief purpose and points of the proposed measure:

UNIVERSITY OF CALIFORNIA RETIREMENT BENEFITS BOARD. INITIATIVE CONSTITUTIONAL AMENDMENT. Moves control of the University of California's retirement programs from the University Regents to a new board of trustees. Requires that the new board of trustees have sole and exclusive responsibility over the assets of any University of California pension or retirement system. Establishes membership of the board of trustees and public meeting requirements for the board of trustees. Summary of estimate by Legislative Analyst and Director of Finance of fiscal impact on state and local government: Increased costs of up to several million dollars per year for UC's retirement programs related to the election of retirement plan trustees and additional staff. Potential changes in investment earnings and costs for UC's retirement programs, which are unknown and impossible to estimate. (08-0019.)

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STEWART WEINBERG  
DAVID A. ROSENFELD  
WILLIAM A. SOKOL  
VINCENT A. HARRINGTON, JR.  
W. DANIEL BOONE  
BLYTHE MCKELSON  
BARRY E. HINKLE  
JAMES RUTKOWSKI  
SANDRA RAE BENSON  
CHRISTIAN L. RAUSNER  
JAMES J. WESSER  
THEODORE FRANKLIN  
ANTONIO RUZ  
MATTHEW J. GAUGER  
ASHLEY K. RIEDA  
LINDA BALDWIN JONES  
PATRICIA A. DAVIS  
ALAN G. CROWLEY  
KRISTINA L. HILLMAN  
ANDREA LAACONI  
EMILY P. RICH  
BRUCE A. HARLAND

# LOCAL 3299

William Schlitz  
Political/Communications Director

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MANJARI CHAWLA  
KRISTINA M. ZINSEN  
JANUARY V. MANABALA  
MANUEL A. BOIGUES  
KERRIANNE R. STEELE  
ANA M. CALLEGOS  
GARY P. PROVENCHER

PATRICIA M. GATES, Of Counsel  
ROBERTA D. PERKINS, Of Counsel  
RICHARD T. DRURY, Of Counsel

Also admitted in Arizona  
Admitted in Hawaii  
Also admitted in Nevada  
Also admitted in Illinois

November 10, 2008

Office of the California Attorney General  
Initiative Coordinator  
P.O. Box 944255  
Sacramento, CA 94244-2550

**RECEIVED**  
NOV 17 2008  
INITIATIVE COORDINATOR  
ATTORNEY GENERAL'S OFFICE

Re: Request for Preparation of a Title and Summary  
Proposed Initiative Measure -- to Add Section 10 to Article IX  
of the California Constitution Relating to the University of California

Dear Sir or Madam:

This letter constitutes a request for the preparation of a Title and Summary for the attached measure, a proposal to amend the California Constitution by adding Section 10 to Article IX, relating to the University of California.

The text of the proposed initiative measure and the certification of the proponents are attached to this letter as Exhibit A.

We have also enclosed a check made payable to the State of California in the amount of \$200.00.

We look forward to your prompt response to this request for the preparation of a Title and Summary regarding this measure. If you have any further questions regarding this, please do not hesitate to contact us at the above-referenced Alameda office address.

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That the Constitution of the State be amended as follows:

That Section 10 is added to Article IX thereof, to read:

(a) The retirement plan of the University of California, as well as its other retirement benefit and postemployment benefit programs, shall comply with the standards for fairness, open governance, and sound management set forth in this section and shall comply with any additional requirements that regulate the plan and those programs that are enacted by statute.

(b) A board of trustees composed of 13 members shall govern the provision of retirement benefits to employees or retirees by the University of California and any trust or similar arrangement established by the University of California to fund postemployment health benefits. All elected members of the board shall serve four-year terms of office. The initial appointment members shall serve two-year terms of office and all subsequent appointed members shall serve four-year terms of office. The board shall be composed of the following:

- (1) Three members appointed by the Regents of the University of California.
- (2) Three ex officio members:
  - (A) The Lieutenant Governor.
  - (B) The Speaker of the Assembly.
  - (C) The Superintendent of Public Instruction.
- (3) One member who is a retiree who is elected by a plurality vote of retirees of the retirement plan.
- (4) Three members who are active faculty or staff participants in the retirement plan who are elected by a plurality vote of all active faculty and staff participants in the retirement plan.
- (5) One member who is a member of the Academic Senate, University of California, who is elected by a plurality vote of all members who are eligible to vote for the Academic Senate, University of California, and who are active participants in the retirement plan.
- (6) One member who holds a nonacademic position and who is elected by a plurality vote of all nonacademic members who are active participants in the retirement plan.



- (7) One member who is represented in their employment by a certified collective bargaining agent, who is elected by a plurality vote of all active participants in the retirement plan who are represented by certified collective bargaining agents.
- (c) Meetings of the board of trustees shall be public, subject to the same exceptions and notice requirements that by statute apply to meetings of the Regents of the University of California.
- (d) The provisions of Section 17 of Article XVI that apply to retirement boards, except subdivision (f), apply to the board of trustees.

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